PART TWO: AREA PLAN GOALS AND OBJECTIVES

INTRODUCTION

Information from the analysis of the needs assessment findings, targeting, and identification of priorities is used to develop the goals and objectives of the Area Plan. Goals are broad concepts and a reflection of the AAA mission. Objectives are specific, and intended to meet specific conditions and help develop action plans.

The Area Plan consists of two types of objectives: System Building and Administration Objectives and Service Unit Plan Objectives.

- 1. System Building and Administration Objectives: Objectives that outline the desired conditions that the AAA intends to achieve through administration, service delivery activities, coordination activities, program development activities, and advocacy activities as required in Title 22, Article 3, Section 7302(a)(5). Area Agencies may not be able to fund all program development and coordination activities out of their administrative budgets to achieve Area Plan goals. The Federal government does allow use of Title III B funds for these purposes, under certain conditions. These additional conditions require public input; e.g., hearing process, clear identification in the plan, area plan budget, and tracking of activities related to these objectives.
 - <u>Title III B funded Program Development (PD) Objectives</u>: Objectives that address only Program Development activities. These objectives require the use of funds allocated for services. AAAs must clearly explain to their communities (public hearing process) that these objectives are using funds that would otherwise be used on services in their communities.
 - <u>Title III B funded Coordination (C) Objectives</u>: Objectives that address only Coordination activities. These objectives require the use of funds allocated for services. AAAs must clearly explain to their communities (public hearing process) that these objectives are using funds that would otherwise be used on services in their communities.
- 2. Service Unit Plan Objectives: The units of service are considered objectives. The service units reported in the Service Unit Plan (SUP) Objectives format clearly delineate the programs and services provided by the AAA with OAA and OCA funds. SUP objectives must tie to a goal. The SUP objectives need not be restated as System Building and Administration Objectives. However, because of the nature of Disease Prevention/ Health Promotion and Medication Management activities, the AAAs are also requested to continue providing written objectives for all services provided with Title III D funds. The objective should clearly explain the activity that is being performed to fulfill the service unit requirement.

SECTION A: GENERAL INSTRUCTIONS

1. Goals and Objectives Criteria

a. <u>Purpose</u>:

The purpose of this section is to provide general instructions for the development of goals and objectives, which are intended to clearly outline the desired condition(s) the AAA intends to achieve and the major steps to achieve these conditions.

Priorities for developing goals and objectives shall be based on: needs assessment findings, taking into consideration funding constraints, targeting mandates, and the adequate proportion/minimum percentage requirements for funding of Priority Services, as defined in *Part Two Section B* below.

b. Required Content: &

1. Format

Each goal shall be presented in the format of "Goal, Rationale, and Objectives."

- Goals and objectives must be clearly identified by title and/or number.
- At a minimum, the Area Plan will include four-year goals and one-year objectives. AAAs may also write objectives for two, three or four-years.¹⁰ New objectives for years two, three, and four also may be submitted in the Area Plan Update process.
- Objectives under each goal should follow in chronological order by projected starting date.

2. Goals

Goals are statements of ideal conditions that the AAA wishes to achieve through its planning efforts.

Key Elements:

- Goals describe a future vision;
- Goals tend to be broad, fairly general, and long-term; and
- Goals are not normally quantitative.

¹⁰ Does not apply to PD or C objectives. PD or C Objectives are time-limited.

Considerations for Developing Goals Should:

- Address client or consumer needs as identified in the needs assessment;
- Pertain to a specific service or to a program-related state or condition;
- Propose the ideal or improved condition for delivery of service within a specified program area (transportation, nutrition, case management, etc.);
 and
- Be written to accommodate more than one funding source or service to meet a specific need.

3. Rationale

The rationale is the fundamental reason for the goal, as derived from the needs assessment results in combination with the AAA's mission and priorities.

4. Objectives

Objectives are measurable statements of action to meet the goals. Objectives are **required** to include the following:¹¹

- ☑ The nature of the action
- ☑ The party responsible for the action
- ☑ How the action will be accomplished
- ☑ The anticipated outcome of that action
- ☑ How the outcome of the action will be measured.
- ☑ The projected dates for starting and completing the action

4a. Examples of Objectives

Unacceptable Objective

Objective: Fund a Health Day event to promote healthy living and fitness by June 2006.

What requirements are met?

This objective does identify the "nature of the action"-Health Day.

What is missing?

- Does it tell you the party responsible for organizing the Senior Health Day?
- Does it tell you how this event will be accomplished?
- Does it tell you what outcome the AAA is expecting from this event?
- Does it tell you how the AAA will measure this outcome?

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¹¹ Staff must also note if an objective is PD or C.

Does it tell you the projected dates for starting and completing the action?

Acceptable Objective 12

The Fresno/Madera Area Agency on Aging (FMAAA) Care Management staff will continue to conduct presentations at home health agencies, hospitals, in-home care providers, skilled nursing facilities, adult day health care centers, and other local institutions to increase the number of referrals for the MSSP Care Management service. To assure a minimum of 30 referrals monthly, a minimum of 24 presentations will be provided to home and community based service providers and the general public during FY 2005-2006. FMAAA Care Management staff.

Does this Objective meet all of the requirements?

- 1. <u>The nature of the action:</u> conduct presentations at home health agencies, hospitals, in-home care providers, skilled nursing facilities, adult day health care centers, and other local institutions.
- 2. The party responsible for the action: FMAAA Care Management staff.
- 3. <u>How the action will be accomplished:</u> a minimum of 24 presentations will be provided to home and community based service providers and the general public.
- 4. <u>The anticipated outcome of that action</u>: increase the number of referrals for the MSSP Care Management service.
- 5. <u>How the outcome of the action will be measured</u>: a minimum of 30 referrals monthly.
- 6. <u>The projected dates for starting and completing the action:</u> Ongoing project will continue through FY 2005-2006.

SECTION B: GOAL AND OBJECTIVE GUIDELINES

1. SYSTEM BUILDING AND ADMINISTRATIVE GOAL AND OBJECTIVE GUIDELINES

☐ Updates: The Goals and Objectives Format (provided at the end of the Coordination Objectives instruction section) must be updated annually, while retaining all objectives for the Four-Year Area Plan.

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¹² Thank you to PSA 14 for the example.

a. Purpose:

The purpose of the goals and objectives developed by the AAA is to reflect the AAA's anticipated efforts to improve services through the four-year planning period. The objectives also provide documentation through which the AAA and the Advisory Council may monitor progress and outcomes of the Plan.

Objectives outline the desired conditions the AAA intends to achieve through administration, service delivery activities, coordination activities, program development activities, and advocacy activities as required in the CCR Article 3, Section 7302(a)(5).

b. Required Content: &

- All AAA goals must be reported in this section in the Goals and Objectives Format.
- All System Building and Administrative objectives must be included in this section in the Goals and Objectives Format.
- The prescribed Goals and Objectives Format is located at the end of the Coordination Objectives section.
- The Goals and Objectives Format is intended to maintain a permanent, progressive record of objectives under each goal.
- The format may be recreated and modified to incorporate the needs of the AAA as long as all of the CDA required elements are included.
- When an objective is completed or deleted, indicate the status in the format provided and continue with a consecutive numbering system.
- The format must be used to maintain and submit goals and objectives for the annual Area Plan Updates and Year-End Reports.

Goals and objectives must be developed to meet the Targeting and Priority Services requirements below:

1. Targeting

As required in the CCR Article 3, Section 7310, and within existing funding constraints, objectives are required to address the needs of targeted populations. (See Targeting Part One Section B.)

2. <u>Priority Services</u> ("Adequate Proportion" of Title III B funding)

To comply with the CCR Article 3, Section 7312, there must be objectives to address the adequate proportion/minimum percentage requirements for Title III B Priority Services. Adequate proportion refers to the minimum amount of Title III B "Other Supportive Services" program funds determined by the AAA to be sufficient for provision of services in each category defined as a "Priority Service." These services include activities related to Access, In-Home Services, and Legal Assistance (Appendix V must be completed).

- At the beginning of the four-year planning cycle, the AAA must establish minimum percentages (one per cent or more) that were determined during the planning process, discussed at the public hearings, and published in the Area Plan.
- The minimum percentages submitted to CDA will be published in the State's four-year plan, and the State Plan will be sent to the federal Administration on Aging for review and approval.
- An AAA may make revisions to the minimum percentages at any time if necessary to adjust to the resources available. If the level is to be reduced, the AAA must follow the process specified in the CCR Article 3, Section 7312(f) and submit a revised Appendix V.
- If an AAA determines that the need for a priority service is fully met without the need to expend Title III B funds, the AAA must carry out the waiver process specified in the CCR Article 3, Section 7312(f) and document the process in Appendix V.

c. Questions:

The AAA's narrative responses to this section must specifically address the following questions to meet the "Required Content" listed above:

- Were the goals and objectives developed from priorities identified by the AAA based upon the needs assessment and taking into consideration funding constraints, targeting mandates, and adequate proportion/minimum percentage requirements for Title III B Priority Services, as required by the CCR Article 3, Section 7300 (c)?
- Do the objectives reflect activities that create, expand, enhance, or otherwise improve services that the AAA provides with OAA and OCA funds, either directly or through contracts with other organizations?

- d. Resource for Development of Goals and Objectives. This section includes considerations for development of goals and objectives, with specific suggestions for including activities related to the Family Caregiver Support Program, the Long-Term Care Ombudsman Program, the Legal Services Program, the Title VII-B Elder Abuse Prevention activities, and the Community Based Service Programs (CBSP).
 - System Building and Administrative Objectives Considerations -Considerations for development of System Building and Administrative objectives are as follows:
 - A separate goal may be developed for each program or service, or objectives related to specific programs may be included under broader goals, such as those that propose to improve the quality of life or the service system. All objectives must tie to a goal.
 - Objectives to enhance existing services, such as increased outreach, program expansion, and quality improvement, can be developed in partnership with other agencies.
 - Explore creative sources of volunteer assistance through local businesses. For example, develop agreements with local management to give employees an extra hour at lunchtime to deliver meals to frail older individuals.
 - How can the AAA plan and advocate for improvements in community based systems that will make more efficient use of existing resources?
 - What impact can the AAA and the Advisory Council have on improving community resources, such as housing, transportation, crime prevention, health care services/facilities and other local resources that will result in improved living conditions throughout the PSA?
 - How can the AAA identify, locate, and include in the planning process or otherwise serve those individuals who live in care facilities, live alone, live in low-income housing, those served by independent living centers, the homeless, and other special populations.
 - Are there businesses or corporations in the PSA that the AAA could call upon for community collaborative efforts, such as fund raising; in-kind donations, including office space, equipment or staff assistance, a venue through which AAA staff may provide an overview of services for employees who are caring for older family members, are anticipating retirement and who may be caring for grandchildren?

 Are there businesses that may be interested in developing a contract with the AAA to provide services through referrals from the Employee Assistance Program, etc.?

2. Elderly Nutrition Program

- Objectives that enhance the Title III C congregate meal program while reflecting the needs of the "baby boomer" population.
- Objectives that address the increasing demand for Title III C home-delivered meals, e.g., innovative sources of funding.
- Objectives to address the decline in meals served in the Title III CI and CII programs.
- Family Caregiver Support Program (FCSP)
 Specialized considerations for development of the FCSP objectives are as follows:
- Coordinate FCSP activities funded by the AAA with other community agencies and voluntary organizations that provide similar types of services.
- Assure that FCSP activities funded by the AAA do not supplant or duplicate family caregiver services supported by other public funds, including:
 - Medi-Cal funding for the Multipurpose Senior Services Program;
 - Funding for Linkages-related services;
 - Title III B in-home services targeted to families of older individuals with cognitive impairments; and
 - California Department of Mental Health funding for Caregiver Resource Centers.
- Establish standards for demonstrating the effectiveness of FCSP services, such as:
 - A decrease in the number of caregivers who report difficulty in getting services;
 - An increase in family caregivers reporting that AAA-funded FCSP services have definitely helped them to provide care for a longer period;
 - An increase in the number of nursing-home eligible older individuals successfully being cared for at home by family members;

- An increase in the client-to-funding ratio, (e.g., through the use of assistive technology and volunteers with no decline in services; and
- A reduction in the lag time for meeting caregiver needs.
- 4. <u>Long-Term Care Ombudsman Program</u> Specialized considerations for development of the Long-Term Care Ombudsman Program objectives are as follows:
 - Recommendations/suggestions for enhancing and/or increasing systemic advocacy that would benefit residents of long-term care facilities.
 - Outreach, marketing of the Long-Term Care Ombudsman Program, and measurement of resident satisfaction with services.
 - Coordinating efforts of the AAA to assist the Long-Term Care Ombudsman Program in achieving the objectives, including the provision of technical assistance to Program staff.
 - Activities related to increasing the number of volunteer Long-Term Care Ombudsmen.
- 5. <u>Legal Assistance Program</u> Specialized considerations for development of the Legal Assistance Program objectives are provided as follows:
 - Establish standards for contracting with the legal services provider best able to deliver legal assistance.
 - Recommendations/suggestions for developing or enhancing existing legal services.
 - Establish standards for demonstrating the efficiency and effectiveness of the legal services provider such as:
 - Increase in elder rights advocacy
 - Increase in legal services to older individuals in greatest economic and social need
 - Increase in number of new cases.
- 6. Elder Abuse Prevention

Specialized considerations for the development of Elder Abuse Prevention objectives are provided as follows:

 Recommendations/suggestions for developing/enhancing programs for the prevention and treatment of elder abuse, neglect, and exploitation.

- Providing for public education and outreach to identify and prevent elder abuse, neglect, and exploitation.
- Ensuring the coordination of services provided by AAAs with services provided by Adult Protective Services.
- Conducting training for individuals, professionals, and paraprofessionals in relevant fields on the identification, prevention, and treatment of elder abuse, neglect, and exploitation, with particular focus on prevention and enhancement of self-determination and autonomy.
- Providing technical assistance to programs that provide or have the potential to provide services to victims of elder abuse, neglect, and exploitation and for family members of the victims.
- 7. <u>CBSP</u> Specialized considerations for development of objectives for each CBSP are provided below:
 - Alzheimer's Day Care Resource Center (ADCRC) Program
 - Recommendations/suggestions for enhancing and/or increasing dementia-specific program services;
 - Outreach, marketing of the ADCRC program, and measurement of caregiver satisfaction; and
 - Coordinated efforts of the AAA to assist ADCRCs to achieve their objectives, including the provision of technical assistance and training to site staff.

Brown Bag Program

- Activities related to increasing the number of distribution sites and variety of food products distributed; and
- Activities associated with the operation of the program.

<u>Linkages Program</u>

- Provision of staff training for new and existing staff;
- Strategies for outreach to underserved populations;
- Changes in service area description; and
- Activities associated with the operation of the program.

- Respite Purchase of Service (RPOS)
 - Activities associated with the operation of the program.
- Senior Companion Program
 - Number of Volunteer Service Years (VSYs) provided for a specific activity, community, etc.
- Health Insurance Counseling and Advocacy Program (HICAP)
 - Strategies for outreach to underserved populations; and
 - Activities associated with the operation of the program.

2. TITLE III B FUNDED PROGRAM DEVELOPMENT (PD) OBJECTIVES GUIDELINES

☑ <u>Updates</u>: The status of PD objectives must be updated annually, while retaining the history of the objectives. (See the Goals and Objectives Format provided at the end of the Coordination Objectives instruction section.)

a. Purpose:

The purpose of this section is to clearly define the reason and requirements for using Title III B funds for PD activities.

<u>Definition:</u> PD defines those activities that either establish a new service or expand or integrate existing services.

When the AAA does not have sufficient administrative funds to meet all program development needs, Title III B "Other Supportive Services" program funds may be used to develop or expand a program. Title III B funds designated for this purpose may then be used for administrative-type activities to enhance any program in the service system. The PD objectives may include a variety of action steps to accomplish an activity. Once the new program or service or site has been developed or enhanced, the PD funding will cease and ongoing activities must be funded through the appropriate program budget.

b. Required Content: &

Title III B funded PD activities must include all of the following elements:

 Specificity: Activities must be directed toward a specific service goal or objective in the Area Plan.

- Consistent with Budgeting Cycles: Activities must occur during a specifically defined period.
- Documented Time Records: Time spent on each PD activity must be documented by the use of employee time records for each staff assigned responsibilities for these activities.

The Code of Federal Regulations (CFR) sets the following minimum requirements for expenditure of Title III B program funds for PD activities:

- The AAA shall not expend funds for PD activities until it has first spent the Total Title III-Allocation for Administration costs. [45 CFR Part 1321.17(f)(14)(i)]
- The AAA shall annually submit to the general public for review and comment the details of proposals to pay for PD activities. [45 CFR Part 1321.17(f)(14)(ii)]
- The AAA shall provide assurances that any such expenditure will have a direct and positive impact on the enhancement of services for older persons in the PSA. [45 CFR Part 1321.17(f)(14)(iii)]

If the AAA uses Title III B program funds for PD activities, specific criteria must be met:

- PD objectives must be written to define the activity and anticipated outcome.
- Objectives must be identified as PD on the Goals and Objectives Format provided in the Guidelines.
- The public and service providers must be given an opportunity to comment on the proposed expenditures. (The PD&C comments section of Appendix II, Public Hearings, must be completed.)
- All objectives in the FIRST year of the four-year Area Plan must be designated as NEW, including objectives that were not completed during the previous Area Plan cycle.
- While PD activities must be specific, time limited, and documented, they may
 be repeated in subsequent years if the outcome of each event is specific and
 directly related to improving services to seniors in the PSA. If a PD objective
 is not completed in the initial fiscal year and activities are to be continued in
 the following year, the objective must be revised and restated to include the
 remaining or additional tasks.

 Multiple year PD objectives may be written in order to accomplish a specific program development activity during the four-year planning cycle as long as the objectives for each year are unique and reflect incremental progress for completion of specific activities within each year, and the budget for each applicable year reflects PD allocations for pertinent activities. (See the fouryear PD objective(s) example in the section below.)

Examples of Program Development Activities/Objectives:

- ☑ Increase the number of participants in the C-1 program by establishing a culturally competent congregate nutrition site for Cambodian older adults where a concentration of Cambodian older persons resides. *To be accomplished by June 30, 2006.*
- ☑ Develop a nutrition site to serve the isolated Russian community in West County by June 30, 2009:
 - Year One: Conduct surveys of older residents and local service providers to determine the types of existing resources, and the need and feasibility of whether to develop a new nutrition site or combine with an existing service. To be completed by June 30, 2006.
 - Year Two: Research locations, potential service facilities, food costs, and transportation resources in the targeted communities. Issue a Letter of Intent to determine interest of vendors/contract agencies. To be completed by April 1, 2007.
 - Year Three: Develop and issue an RFP for a meal site that can provide both congregate and home-delivered ethnic meals. Determine whether a qualified contractor is available or if the AAA will need to develop a direct-service nutrition program. To be completed by June 30, 2008.
 - Year Four: Award the contract and/or open the new site by January 1, 2009.

3. TITLE III B FUNDED COORDINATION (C) OBJECTIVES GUIDELINES

☑ <u>Updates</u>: The status of (C) objectives must be updated annually, while retaining the history of the objectives. (See the Goals and Objectives format at the end of this section.)

a. Purpose:

The purpose of this section is to clearly define the reason and requirements for using Title III B funds for (C) activities.

<u>Definition:</u> Definition from Area Plan Contract

Coordination means activities that involve the active participation of the Area Agency on Aging (AAA) staff to include liaison with non-OAA funded agencies and organizations for the purpose of avoiding duplication, improving services, resolving problems related to service delivery, and addressing the service needs of the eligible service population.

When the AAA does not have sufficient administrative funds to meet all coordination needs, Title III B "Other Supportive Services" program funds may be used for (C) activities with other community organizations to improve the senior service system. Title III B funds designated for this purpose may then be used for administrative-type activities to enhance any program in the service system. The (C) objectives may include a variety of action steps to accomplish an activity. Once a Coordination function has been completed, the ongoing activities must be funded by the appropriate program budget.

b. Required Content: &

<u>Title III B Funded Coordination (C) activities shall include all of the following elements:</u>

- Specificity: Activities must be directed toward a specific service goal or objective in the Area Plan.
- Consistent with Budgeting Cycles: Activities must occur during a specifically defined period.
- Documented Time Records: Time spent on each (C) activity must be documented by the use of employee time records for each staff assigned responsibilities for these activities.

The Code of Federal Regulations (CFR) sets the following minimum requirements for expenditure of Title III B program funds for Coordination activities:

- The AAA shall not expend funds for (C) activities until it has first spent the total Title III-Allocation for administration costs. [45 CFR, Part 1321.17(f)(14)(i)]
- The AAA shall annually submit to the general public for review and comment the details of proposals to pay for (C) activities. [45 CFR, Part 1321,17(f)(14)(ii)]
- The AAA shall provide assurances that any such expenditure will have a direct and positive impact on the enhancement of services for older persons in the PSA. [45 CFR Part 1321.17(f)(14)(iii)]

If the AAA uses Title III B program funds for (C) activities, specific criteria must be met:

- (C) objectives must be written to define the activity and anticipated outcome.
- Objectives must be identified as (C) on the Goals and Objectives Format provided in Part Two, Section B of the guidance.
- The public and service providers must be given an opportunity to comment on the proposed expenditures. (The PD&C comments section of Appendix II Public Hearings must be completed.)
- The act of convening or attending a meeting does NOT satisfy the criteria for an objective. An objective must include the intended results or accomplishments of a meeting or a series of meetings.
- While (C) activities must be specific, time limited, and documented, they may
 be repeated in subsequent years if the outcome of each event is specific and
 directly related to improving services to seniors in the PSA. If a (C) objective
 is not completed and activities are to be continued in the following year, the
 objective must be revised and restated with the remaining or additional tasks.
- All objectives in the FIRST year of a four-year plan must be considered NEW, including objectives that were not completed during the previous area plan cycle.

Examples of Coordination Activities/Objectives¹³:

- AAA will partner with Community Solutions of Doctors Medical Center Foundation to promote seminars addressing grief, loss, depression, and loneliness. The seminars will be held in Modesto in September 2005 and will be measured by the attendance and commitment to future seminars. 7/1/05-9/30/05
- ☑ The AAA will coordinate with the Behavioral Health and Recovery Services (BHRS) department to conduct depression screenings at the 14 nutrition sites in the county during October, Depression Screening Month. Measurement will be by attendance at the screening sessions and by participation in follow-up sessions by the BHRS.

¹³ Thank you to PSA 30 for the examples.

4. GOALS AND OBJECTIVES FORMAT

System-Building and Administrative Goals and Objectives Including Program Development (PD) and Coordination (C) Objectives

Refer to Part Two: Introduction and Section A and Section B for complete directions

- ➤ All goals and objectives for the **FIRST** year of the four-year Area Plan must be recorded as **NEW**, including objectives that were not completed during the last Area Plan cycle.
- ➢ If Title III B funds are used for Program Development or Coordination objectives, either PD or C must be indicated in the appropriate column. (The PD&C section of Appendix II must be completed.)
 - ☐ <u>Updates:</u> The format below must be maintained for all four years of the Area Plan cycle, and the amended version must be submitted with each Area Plan Update.

Goal Number & Goal			
Rationale			
List Objective Number(s) & Objective(s) [Must follow requirements specified in CCR Article 3, Section 7300 (c)]	Projected Start & End Dates	Title III B Funded PD or C ¹⁴	Status 15

[.]

¹⁴ Indicate if Program Development (PD) <u>or</u> Coordination (C) – cannot be both. If a PD or C objective is not completed and is continued the following year, the objective must be revised and restated with the remaining or additional tasks.

¹⁵ Status: Indicate if objective is **New, Continued, Revised, Completed**, or **Deleted.**

5. SERVICE UNIT PLAN (SUP) OBJECTIVES GUIDELINES

NOTE: Required Services (Required services are Access, In-Home and Legal) not funded by Federal or State funds must be addressed in Appendix XIII. (Example: Title III B Information and Assistance is funded by local county funds.) This information must be added to Appendix XIII.

<u>Updates</u>: The SUP Objectives must be updated annually to include all of the requirements for the current year <u>and</u> must retain historical data through the four-year period.

a. Purpose:

The purpose of this section is to clearly delineate the programs and services provided by the AAA with OAA and OCA funding.

b. Required Content: &

- The SUP Objectives for 2005 2009 are set up as "living documents" to capture service units by category for the four-year planning cycle. The SUP will retain a record of service units by fiscal year for the life of the document.
- Proposed service units by service category must be entered for <u>all</u> SUP objectives at the beginning of each new fiscal year for a minimum of one-year or for multiple years. Data for all prior years of the four-year planning cycle must be retained.
- All SUP Objectives (the units of service are considered objectives) must tie to a
 goal. The SUP Objectives need not be restated as System Building and
 Administration Objectives except for Title III D objectives.
- Where applicable, indicate the units of service to be provided with all funding sources, such as federal funds, State funds, NSIP, local funds, program income, etc. All programs identified with units of service must be listed in the budget.
- SUP objectives must be consistent with programs listed in the budget.
- Each SUP must be submitted in the prescribed format, as one complete section.
 If funding is not allocated for a particular service, check the "not applicable" box for that category and submit the entire SUP document.

Service Unit Plan (SUP) objectives are required for each of the following funding sources:

- Title III/VII Service Unit Plan;
- o Title III E Service Unit Plan;

- CBSP Service Unit Plan;
- Title V Service Unit Plan (if the AAA is a funding recipient); and
- HICAP Service Unit Plan (each AAA must work with the managing AAA to complete this section).
- c. Completing Title III/VII 16 and III E Service Unit Plan Objectives.
- Fiscal Year: No entry required.
- <u>Column 1</u>: Proposed Units of Service. Proposed service units are required at the beginning of each fiscal year. The AAA has the option of projecting units for subsequent years, as well.
- Column 2: List the goal number(s) to which the service units are tied.
- <u>Column 3</u>: List **all** additional goals and objectives that are related to this service category.
- d. Completing Title III/VII Ombudsman Service Unit Plan Objectives
- Fiscal Year: No entry required
- <u>Column 1</u>: Proposed Units of Service. Proposed service units are required at the beginning of each fiscal year. The AAA has the option of projecting units for subsequent years, as well.
- Column 2: List the goal number(s) to which the service units are tied.
- Column 3: List all additional goals and objectives that are related to this service category.
- Complete all tables
- e. Completing Title V/SCSEP Service Unit Plan Objectives
- Complete all tables
- f. Completing CBSP Service Unit Plan Objectives
- Fiscal Year: No entry required

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Additional instructions for completion of the Ombudsman section of the Title III/VII SUP Objectives are in Section d.

- Column 1: List the goal number(s) to which the service units are tied.
- Complete all tables

g. Completing the HICAP Service Unit Plan Objectives

AAAs that are regionally managing HICAP services for two or more PSAs (their own and others) through a Memorandum of Understanding (MOU) shall only report service units for their PSA. The managing AAAs must work cooperatively with the other AAAs in their HICAP jurisdiction to help them set each of the PSA service levels for HICAP.

Each AAA must report HICAP service units to be performed within its PSA, whether it manages its own services or services are managed by another AAA through an MOU.

It is the responsibility of all parties operating under a HICAP MOU to identify and agree, on an ongoing basis, the appropriate level of service funding and appropriate level of HICAP services to be performed within their PSAs in proportion to each PSA's funding. A breakout of the prorated funding for each of the 33 PSAs for HICAP services will be available on CDA's website under "AAA-Partners."

- Fiscal Year: No entry required
- <u>Column 1</u>: Proposed Units of Service. Proposed service units are required at the beginning of each fiscal year. The AAA has the option of projecting units for subsequent years, as well.
- Column 2: List the goal number(s) to which the service units are tied.
- Column 3: List all additional goals and objectives that are related to this service category.
- Complete all tables

TITLE III/VII SERVICE UNIT PLAN OBJECTIVES

PSA#

2005 – 2009 Four Year Planning Period CCR Article 3, Section 7300(d)

The Service Unit Plan (SUP) uses the National Aging Program Information System (NAPIS) Categories and units of service, as defined in PM 97-02. For services <u>not</u> defined in NAPIS, refer to Division 4000 of the Management Information Systems (MIS) Manual. Report units of service to be provided with <u>ALL funding sources</u>.

Related funding is reported in the annual Area Plan Budget (CDA 122) for Titles III B, III C-1, III C-2,

III D, VII (a) and VII (b). This SUP does **not** include Title III E services.

For discretionary services that will <u>not</u> be provided, check the Not Applicable bo \Box .	X
TITLE III/VII	

1. Personal Care (In-Home)*

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006	Office of Oct vice		Objective Humbers
2006-2007			
2007-2008			
2008-2009			

2. Homemaker (In-Home)*

Units of Service = (1-Hour)
Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

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3.	Chore	(In-Home)	٠,
J .			,

Units o	of Service	= (1-Hour)
Not Ap	plicable:		(check)

	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Home Delivered Meals 4.

Units of Service = (1-Meal)

•	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Adult Day Care/Health 5.

Units o	of Service :	= (1-Hour)
Not Ap	plicable: [(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

6.	Case	Management	(Access	۱*
٥.	ouse	Management	(70003	,

Units	of Service	= (1-Hour)
Not A	pplicable:	(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Indicates Title III-B Priority Services
 Indicates Title III-B Priority Services
 Indicates Title III-B Priority Services

7. Congregate Meals

Units of Service = (1-Meal)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

8. <u>Nutrition Counseling</u>

Units of Service =	(1-Hour)
Not Applicable:	(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

9. <u>Assisted Transportation</u> (Access)* Units of Serv

Units of Service :	= (One 1-way trip)
Not Applicable:	(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

10. <u>Transportation</u> (Access)*

Units of Service = (One 1-way trip) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

^{*} Indicates Title III-B Priority Services

11.	. Legal	Assistance*

Units of Service = (1-Hour)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

12. <u>Nutrition Education</u>

Units of Service = (1-Session)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

13. <u>Information and Assistance</u> (Access)*

Units of Service = (1-Contact) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

14. Outreach (Access)*

Units of Service = (1-Contact) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

15. NAPIS Service Category 15 - "Other" Title III Services

- In this section, identify <u>Title III D</u> services (required); and also identify all <u>Title III B</u> services (discretionary) to be funded that were <u>not</u> reported in NAPIS categories 1–14 above. (Identify the specific activity under the Service Category on the "Units of Service" line when applicable.)
- Specify what activity constitutes a unit of service (1 hour, 1 session, 1 contact, etc.).
 - (Reference Division 4000 of the MIS Operations Manual, January 1994.)
- Each <u>Title III B</u> "Other" service must be an approved NAPIS Program 15 service listed on the "Schedule of Supportive Services (III B)" page of the Area Plan Budget (CDA 122). [Title III B Example: <u>Service Category</u>: Community Services/Senior Center Support. <u>Units of Service</u>: 1 hour Activity Scheduling.]

Title III D, <u>Disease Prevention/Health Promotion</u> Service Activity:____

Units of S	Service - ()	
	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers (Required for
			Title III D)
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Title III D, <u>Disease Prevention/Health Promotion</u> Service Activity: Units of Service E ()

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers (Required for
			Title III D)
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Ē E	Intry Required	

Title III D, Disease Prevention/Health Promotion

Service Activity:
Units of Service E (

		/	
	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers (Required for
			Title III D)
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Title III D, <u>Disease Prevention/Health Promotion</u> Service Activity: Units of Service E (_____)

011110 01 0	, <u> </u>	,	
	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers (Required for Title III D)
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Title III D, <u>Disease Prevention/Health Promotion</u> Service Activity: Units of Service E (_____)

• • • • • • •	· · · · · · · · · · · · · · · · · · ·		
	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers (Required for Title III D)
2005-2006			
2006-2007			
2007-2008			
2008-2009			

^Ē Entry Required ^Ē Entry Required ^Ē Entry Required

•	Service ^E ()	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers (Required for Title III D)
2005-2006			,
2006-2007			
2007-2008			
Title III D, Service A		nagement	
Title III D, Service A Units of S	ctivity: Service ^E ()		2
Title III D, Service A Units of S	ctivity:	nagement 2 Goal Numbers	3 Associated Program Goal and Objective Numbers (Required for Title III D
Title III D, Service A Units of S Fiscal Year	ctivity: Service ^E () 1 Proposed	2	Associated Program Goal and
Title III D, Service A Units of S	ctivity: Service ^E () 1 Proposed	2	<u> </u>
Title III D, Service A Units of S Fiscal Year	ctivity: Service ^E () 1 Proposed	2	Associated Program Goal and

Units of S	Service ^E ()	
	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers (Required for
			Title III D)
2005-2006			
2006-2007			
2007-2008			
2008-2009			

 $^{^{15}}$ Refer to Program Memo 01-03 and the Title III D Fact sheet in Resource Tools in the Appendices

Title III D, Medication Management

Service Activity:
Units of Service E (_____

	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers (Required for Title III D)
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Title III B, "Other Supportive Services" 16

Service Category:

Units of Service and Activity ^E (

	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Title III B, "Other Supportive Services"

Service Category:

Units of Service and Activity ^E ()

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Title III B, "Other Supportive Services"

Service Category:

Units of Service and Activity ^E (

		· · · · · · · · · · · · · · · · · · ·	
	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

^E Entry Required

16 Other Support Services: Visiting (In-Home) now includes Telephoning (See Area Plan Budget).

Title III B, "Other Supportive Services" Service Category: Units of Service and Activity ^E ()				
	1	2	3	
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers	
2005-2006				
2006-2007				
2007-2008				
2008-2009				
Title III B <u>, "Other Supportive Services"</u> Service Category:				

Units of Service and Activity ()			
	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

^Ē Entry Required

LONG-TERM CARE OMBUDSMAN

(Title III B and Title VII a)

Note: For completion of this section, see Instructions for SUP Objective **Guidelines**

Total number of cases to be closed: Units of Service = (one closed case)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

<u>Training for Ombudsman staff and volunteers</u>
(Includes 36-hour Certification Training and 12-Hour Required Annual Training)

Fiscal Year	Number of Sessions
2005-06	
2006-07	
2007-08	
2008-09	

Fiscal Year	Number of Hours
2005-06	
2006-07	
2007-08	
2008-09	

Fiscal Year	Total Number of Trainees
2005-06	
2006-07	
2007-08	
2008-09	

<u>Visit</u>s

Fiscal Year	Number of Visits to SNFs (Unduplicated Count)
2005-06	
2006-07	
2007-08	
2008-09	

Fiscal Year	Number of Visits to RCFEs
	(Unduplicated Count)
2005-06	
2006-07	
2007-08	
2008-09	

Visits, cont.

Fiscal Year	Projected Number of Volunteers needed
2005-06	
2006-07	
2007-08	
2008-09	

Fiscal Year	Number of Existing
	Volunteers
2005-06	
2006-07	
2007-08	
2008-09	

ELDER ABUSE PREVENTION SERVICES (TITLE VII b)

Actual Units of Service for the tables below will be reported in NAPIS Service Category 15

The services provided with the units of service will be reported in the Year End Report.

Activities that support the coordination of elder abuse prevention, investigation, and/or prosecution.

Units of Service = (1 Hour)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Other Title VII b activities from Division 4000.

Service Category: Units of Service ^E (____)

	1	2	3
Fiscal Year	Proposed	Goal	Associated Program Goal and
	Units of Service	Numbers	Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Service Category: Units of Service [£] ()

•	1	2	3
Fiscal Year	Proposed	Goal	Associated Program Goal and
	Units of Service	Numbers	Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Ē	Entry	Req	ui	red
---	-------	-----	----	-----

Other Program Accomplishments

Fiscal Year	Total # of Public
	Education Sessions
2005-06	
2006-07	
2007-08	
2008-09	

Fiscal Year	Total # of
i ioodi i odi	Educational Materials
	Developed (Products)
2005-06	·
2006-07	
2007-08	
2008-09	

Fiscal Year	Total # of Training Sessions for Professionals
2005-06	
2006-07	
2007-08	
2008-09	

Fiscal Year	Total # of Educational Materials Distributed (Documents)
2005-06	, ,
2006-07	
2007-08	
2008-09	

TITLE III E SERVICE UNIT PLAN OBJECTIVES

PSA#

2005 – 2009 Four Year Planning Period CCR Article 3, Section 7300(d)

The Service Unit Plan (SUP) utilizes the service categories defined in PM 03-10. Related Title III E funding is reported in the Area Plan Budget (CDA 122). This SUP is for the reporting of Title III E services **only**.

Report units of service to be provided with **ALL** funding sources.

For services that will not be provided, check the Not Applicable box				
	TITLE III E			
1. <u>Outreach</u>			Units of Service = (1-Contact) Not Applicable: ☐(check)	
	1	2	3	
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers	
2005-2006				
2006-2007				

2. Community Education

2007-2008 2008-2009

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
007-2008			
2008-2009			

3. Information and Assistance

Units of Service = (1-Contact) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

4. Comprehensive Assessmen

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

5. Case Management

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

6. Transportation

Units of Service = (One 1-way trip) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

7. Assisted Transportation

Units of Service = (One 1-way trip) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

8. Counseling

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

9. Caregiver Support Group

Units of Service = (1-Hour Meeting)
Not Applicable: ☐(check)

			, ibb
	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

10. <u>Caregiver ¹⁷ Training</u>

Units of Service = (1-Contact) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

11. Respite Care Services

Units of Service = (1-Hour) Not Applicable: ☐(check)

•	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

12. Minor Home Modifications

Units of Service = (1-Occurrence) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

 $^{^{17}}$ Caregiver: As defined in the Title III E Program: Unpaid, informal assistance provided by supportive family members or friends.

|--|

Units of Service = (1-Placement) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

14. Homemaker

Units of Service = (1-Hour) Not Applicable: ☐(check)

•	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

15. Chore

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

16. Home Security & Safety

Units of Service = (1-Occurrence) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units	Goal Numbers	Associated Program Goal and
	of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

17. Assistive Devices

Units of Service = (1-Single Occurrence) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

18. <u>Vis</u>	<u>iting</u>
----------------	--------------

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

19. Congregate Meals

Units of Service = (1-Meal) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

20. Home Delivered Meals

Units of Service = (1-Meal) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

21. Legal Assistance

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units	Goal Numbers	Associated Program Goal and
	of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

22. Peer Counseling

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

23.	Translation/Interpretation	ì

Units	of Service =	(1-Hour)
Not A	oplicable: 🗌	(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

24. Income Support/Material Aid

Units of Service = (1-Occurrence) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

25 Money Management

Units of Service = (1-Hour) Not Applicable: ☐(check)

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

26. Registry

Units of Service = (1-Match) Not Applicable: ☐(check)

•	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Other - Specify:

Service Categ Requires PRIC	-		Service: ^E entry required icable:
	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers

Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

Entry required

TITLE V/SCSEP SERVICE UNIT PLAN OBJECTIVES

PSA#

2005 - 2009 Four Year Planning Period CCR Article 3, Section 7300(d)

The Service Unit Plan (SUP) utilizes the new Data Collection System developed by the U.S. Department of Labor (DOL), which captures the new performance measures per the Older Americans Act of 1965 as amended in 2000, and the Federal Register 20 CFR Part 641. The related funding is reported in the annual Title V/SCSEP Budget.

Please list your performance measures in the table below. Each AAA must achieve at least the DOL's minimum required performance measures, unless lower measures have been negotiated and approved by the DOL. AAAs may indicate higher performance measures as well.

Title V/SCSEP

•				
Fiscal Year	Goal	Objective	CDA Authorized	National Authorized Slots
(FY)	Number	Number	Slots	(If applicable)
2005-06				
2006-07				
2007-08				
2008-09				

DOL's Minimum Required Performance Measures

Placement Rate – DOL's Minimum Unsubsidized Placement Goal is 25%

FY	Estimated Unsubsidized Placement Goal %	
2005-06		
2006-07		
2007-08		
2008-09		

2. Service Level - DOL's Minimum Service Level is 140%

FY	Estimated Service Level %
2005-06	
2006-07	
2007-08	
2008-09	

¹⁸ If not providing Title V, enter PSA number followed by "Not Providing".

3. Service to the Most in Need – DOL's Minimum Goal to Serve the Most in Need is 68%

FY	Estimated % Service to the Most in Need
2005-06	
2006-07	
2007-08	
2008-09	

4. Community Service Hours Provided – DOL's Minimum Goal for Community Serve Hours

Provided is 999,400 hours, which is 91% (approximately 950 hours per authorized slot)

FY	Estimated Community Service Hours Provided
2005-06	
2006-07	
2007-08	
2008-09	

5. Employment Retention Rate – DOL's Minimum Employment Retention Rate is 70%

FY	Estimated Employment Retention Rate %
2005-06	
2006-07	
2007-08	
2008-09	

6. Customer Satisfaction for Employers, Participants, and Host Agencies – DOL's Combined

Minimum Customer Satisfaction Rate for Employers, Participants, and Host Agencies is 80%

1 19 11 11 11 11 11 11		
FY	Estimated % Combined Customer Satisfaction Rate	
2005-06		
2006-07		
2007-08		
2008-09		

7. Earnings Increase –

DOL's Minimum Goal for Earnings Increase 1 is 25% Higher than the Pre-Program Earnings

DOL's Minimum Goal for Earnings Increase 2 is 5% Higher than Earnings Increase 1

FY	Estimated Earnings Increase 1	Estimated Earnings Increase 2
2005-06		
2006-07		
2007-08		
2008-09		

COMMUNITY BASED SERVICES PROGRAMS SERVICE UNIT PLAN (CBSP) OBJECTIVES:

PSA#

2005 – 2009 Four Year Planning Period CCR Article 3, Section 7300(d)

The Service Unit Plan (SUP) follows the instructions for layouts provided in PM 98-26 (P) and updated in PM 00-13 (P). The related funding is reported in the annual Area Plan Budget (CDA 122). Report units of service to be provided with <u>ALL</u> funding sources.

For services that will not be provided, check the Not Applicable box
CBSP
<u></u>

<u>Alzheimer's Day Care Resource Center (ADCRC)</u> Not Applicable: ☐(check)

Fiscal Year	Goal Numbers
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	In-Service Training Sessions
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Professional/Intern
	Educational Training
	Sessions
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Caregiver Group Support
	Sessions
2005-2006	
2006-2007	
2007-2008	
2008-2009	

	•
Fiscal Year	Public/Community Education Training Sessions
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Brown Bag

Fiscal Year	Goal Numbers
2005-2006	
2003-2000	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Estimated Pounds of
	Food to be
	Distributed
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Estimated # of
	Volunteer Hours
2005-2006	
2006-2007	
2007-2008	
2008-2009	

(CBSP) Respite Purchase of Services - RPOS

	•
Fiscal Year	Goal Numbers
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Not Applicable: ☐(check)

Fiscal Year	Estimated # of
	Unduplicated Persons to
	be Served
2005-2006	
2006-2007	
2007-2008	
2008-2009	

	•
Fiscal Year	Estimated # of Volunteers
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Estimated # of
	Distribution Sites
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Not Applicable: ☐(check)

Fiscal Year	Estimated Total Number
	of Respite Hours
	Purchased
	(Includes In-home, Day
	Care and Institutional
	hours)
2005-2006	·
2006-2007	
2007-2008	
2008-2009	

CBSP) Respite Purchase of Services – RPOS

	•
Fiscal Year	Estimated Number of In-Home Hours to be purchased
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Estimated Number of Day Care Hours to be Purchased
2005-2006	
2006-2007	
2007-2008	
2008-2009	

(CBSP) Respite Purchase of Services - RPOS

Fiscal Year	Estimated Number
	of Institutional Hours
	to be Purchased
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Estimated Number of
	Unduplicated Clients
	Served
2005-2006	
2006 2007	
2006-2007	
2007-2008	
2008-2009	

Linkages

Goal Numbers

	•
Fiscal Year	Number of Unduplicated Clients Served
	(Include Targeted Case Management and
	Handicapped Parking Revenue)
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Not Applicable: ☐(check)

Fiscal Year	Active Monthly Caseload
	(Include Targeted Case Management and
	handicapped parking revenue)
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Senior Companion

Fiscal Year	Goal Numbers
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Volunteer Service Years (VSYs)
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Volunteer Hours
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Seniors Served
2005-2006	
2006-2007	
2007-2008	
2008-2009	

Fiscal Year	Senior Volunteers
2005-2006	
2006-2007	
2007-2008	
2008-2009	

HEALTH INSURANCE COUNSELING AND ADVOCACY PROGRAM (HICAP) SERVICE UNIT PLAN OBJECTIVES

PSA #_

2005 – 2009 Four Year Planning Period CCR Article 3, Section 7300 (d)

The Service Unit Plan (SUP) utilizes definitions that can be found at www.aging.ca.gov. After connecting with the home web page, select "AAA Partners," then "Reporting Instructions," then select "HICAP Reporting Instructions as of July 1, 2004." HICAP reporting instructions, forms, and definitions are centralized there.

The related funding is reported in the HICAP Budget. Indicate the estimated service performance units provided with federal and state HICAP funds.

HICAP Services

References to Plan Goal(s) and Objective(s) related to HICAP Services <u>without</u> Legal Services Component

	1	2	3
Fiscal Year	Proposed	Goal Numbers	Associated Program Goal and
	Units of Service		Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

1. HICAP Budget without HICAP Legal Services Budget

Fiscal Year	Estimated State & Federal Budget Amount
2005-06	\$
2006-07	\$
2007-08	\$
2008-09	\$

3. Community Education

Fiscal Year	# of Attendees reached at
	Interactive Presentations in
	SFY. Unit of Service =
	(1 Attendee Reached)
2005-06	
2006-07	
2007-08	
2008-09	

2. Community Education

Fiscal Year	Estimated # of Interactive Presentations in SFY. Unit of Service = (1 Presentation)
2005-06	
2006-07	
2007-08	
2008-09	

4. Counseling

Fiscal Year	Estimated # of Clients Counseled in SFY. Unit of Service = (1 Client Counseled)
2005-06	
2006-07	
2007-08	
2008-09	

5. Counselors

<u> </u>			
Fiscal Year	Estimated # of Registered		
	Counselors for SFY.		
	Unit of Service =		
	(1 Unduplicated Registered		
	Counselor)		
2005-06			
2006-07			
2007-08			
2008-09			

7. Counselors

Fiscal Year	Estimated # of Active Counselors for SFY. Unit of Service = (1 Unduplicated Active Counselor)
2005-06	
2006-07	
2007-08	
2008-09	

6. Counselors

Fiscal Year	Estimated # of Volunteer	
	Registered Counselors for SFY.	
	Unit of Service =	
	(1 Volunteer Registered	
	Counselor)	
2005-06		
2006-07		
2007-08		
2008-09		

8. Counselors

Fiscal Year	Estimated # of Volunteer Active Counselors for SFY. Unit of Service = (1 Unduplicated Volunteer Active Counselor)
2005-06	
2006-07	
2007-08	
2008-09	

HICAP Legal Services (if funded and available through HICAP) References to Plan Goal(s) and Objective(s) related to HICAP Legal Services Component

	1	2	3
Fiscal Year	Proposed Units of Service	Goal Numbers	Associated Program Goal and Objective Numbers
2005-2006			
2006-2007			
2007-2008			
2008-2009			

9. HICAP Legal Services Budget Only

•	
Fiscal Year	Estimated State &
	Federal Budget
	Amount
2005-06	\$
2006-07	\$
2007-08	\$
2008-09	\$

10. Clients

Fiscal Year	Estimated Clients Served for SFY Unit of Service = (1 Client Served)
2005-06	
2006-07	
2007-08	
2008-09	

11. Representation

ii. Representation	
Fiscal Year	Estimated Hours of
	Legal Representation
	for SFY.
	Unit of Service =
	(1 Hour of Legal
	Representation)
2005-06	
2006-07	
2007-08	
2008-09	

12. Representation

Fiscal Year	Estimated Hours of Legal Backup Support to Staff for SFY. Unit of Service = (1 Hour of Legal Backup Support)
2005-06	
2006-07	
2007-08	
2008-09	